



STATE OF WISCONSIN
 Department of Employee Trust Funds
 Robert J. Conlin
 SECRETARY

Wisconsin Department
 of Employee Trust Funds
 PO Box 7931
 Madison WI 53707-7931
 1-877-533-5020 (toll free)
 Fax 608-267-4549
 etf.wi.gov

Correspondence Memorandum

Date: May 21, 2018
To: Employee Trust Funds Board
 Teachers Retirement Board
 Wisconsin Retirement Board
From: Mark Lamkins, Director, Office of Communications
Subject: Communications Update

This memo is for informational purposes only. No Board action is required.

New Educational Resources for Members

The following efforts to offer new educational resources for members support strategic goal #7 of the 2015-2019 Strategic Plan, which states: “Provide information and education, accessible services, and interactive communications to meet customers’ needs.

ALEX

The Department of Employee Trust Funds is set to launch ALEX, an interactive and personalized benefits decision-making tool, later this summer. Initially ALEX will be a virtual benefits counselor to assist members and cover health insurance, life insurance, disability, tax savings options, and other related topics. Members will find information in plain language – no jargon – and links to additional resources on ETF’s website.

ALEX, a product of Jellyvision, is cloud-based and secure in that it does not require any personally identifiable information or personal health information. It also meets accessibility requirements under Section 508 of the Rehabilitation Act.

The Office of Strategic Health Policy (OSHP) was part of the vendor procurement and product development for the University of Wisconsin System’s [ALEX](#) that was implemented last fall. This allowed us to learn from UW’s experiences and build on the existing product, which will reduce our development time and costs.

The Member Communications and Education Workgroup, including ETF frontline staff and employers, will assist OSHP and the Office of Communications in reviewing ALEX content and functionality.

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary

Electronically Signed 6/11/18

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Since ALEX can be customized, a future version could help members better understand and make decisions about their Wisconsin Retirement System benefits.

Other New Educational Resources

We are nearing completion of a series of eLearning modules on the Accumulated Sick Leave Credit Conversion Program. Three modules, averaging five minutes each, will provide a general overview for new hires; steps to take when nearing retirement; and instruct how to escrow or save sick leave credits for members leaving the state group health insurance program.

We are also updating the curriculum and tools used in 20 different webinars on WRS benefits and converting live-only webinars to recorded webinars or eLearnings for convenient, 24/7 access. This effort is being coordinated with the Member Services Bureau and subject matter experts.

Member Services at Hill Farms

We provided uninterrupted services for members and employers both during and immediately after ETF's move to the Hill Farms State Office Building at the end of March. We are trying to ensure communications help members easily find our new offices, and collecting survey feedback to identify ways to improve the customer experience. In the first few weeks at Hill Farms, the Member Services Bureau served hundreds of members through scheduled appointments and walk ins.

You will find [information for visitors](#) on the ETF website, which includes an area map and directions, a visual aid on how to get from the parking garage and building security to an individual or group appointment, etc. We continue to work with the Department of Administration to improve directional signage in the parking garage and building.

The ETF reception area on the 8th floor includes convenient access to the large group counseling room and seven private counseling rooms. There is guest Wi-Fi and a computer for members to access web resources. Two wall-mounted TV monitors present timely information, helpful tips on retirement, insurance and other benefits administered by ETF.

Customer Engagement Metrics for First Quarter: January-March 2018

- [ETF E-mail Updates](#) – 48 mass emails sent; 870 new subscribers; 84,826 total subscribers.

Members, employers and other stakeholders can subscribe to *ETF E-mail Updates* on retirement, health and other WRS benefits. Almost half of the total subscribers include emails collected from webinar registrations and the Customer Service Call Center.

- Twitter [@WI ETF](#) – 133 tweets; 106,100 impressions; 46 new followers; 718 total followers.

Part of our Twitter communications plan is recruiting talented employees, promoting the ETF culture and recognizing individual contributions. The below top tweets for first quarter use images of real ETF employees. Interestingly, tweets and hashtags for recruitment consistently receive the highest number of impressions.

Top Tweet earned 1,516 impressions

Are you a **#FinancialReporting** director with advanced knowledge of governmental accounting standards and reporting requirements? Join our team!
goo.gl/SG6AdR **#Wljobs** **@wiscjobs**
pic.twitter.com/YGI4w09zDN



Top media Tweet earned 1,480 impressions

#Hiring: #InformationSecurity professional to analyze, manage and lead complex **#ITprojects**. Apply by 3/29.
goo.gl/7H8KKw **#Wljobs** **@wiscjobs**
pic.twitter.com/JzU6uLIST2



- ETF website, etf.wi.gov – Please see Attachment A for website usage, including a comparison of unique visitors and average pages viewed by month. There was a significant increase in pages viewed in first quarter compared to the same quarter in previous years. One notable event that may have contributed to increased web traffic was the IRS change to the federal tax tables for 2018. ETF advised retirees to review how the new tax affects their monthly annuity payments and to adjust their income tax withholding elections accordingly.

Top 10 viewed pages in first quarter:

1. [Member Education](#)
2. [WRS Benefits Summary](#)
3. [WRS Retirement Benefits Calculator](#)
4. [Publications and Forms](#)
5. [Employer Resources](#)
6. [WRS Trust Funds Investment Performance](#)
7. [January 2018 WRS News Online for Active Employees](#)
8. [It's Your Choice 2018 State Employee Landing Page](#)
9. [Core Fund and Variable Fund: Returns, Rates and Adjustments](#)

10. [ETF Announces WRS Annuity Adjustments](#)

Top 10 downloaded publications or forms in first quarter:

1. [Calculating Your Retirement Benefits \(ET-4107\)](#)
2. [January 2018 WRS News for Retirees \(ET-7402\)](#)
3. [Beneficiary Designation \(ET-2320\)](#)
4. [Substitute W-4P Tax Withholding Certificate for Pension or Annuity Payments \(ET-4310\)](#)
5. [Income Continuation Insurance \(ET-2106\)](#)
6. [Your Benefit Handbook \(ET-2119\)](#)
7. [Choosing An Annuity Option \(ET-4117\)](#)
8. [Spring 2018 WRS Employee Benefit Presentations \(Employer Bulletin, Vol. 35, No. 4\)](#)
9. [Group Insurance Board February 21, 2018 Meeting Agenda](#)
10. [Deferred Compensation Board March 22, 2018 Meeting Agenda](#)

Other Updates

Group Presentations

This spring Secretary Conlin presented at the district meetings of the Wisconsin Retired Educators' Association and conferences of the University of Wisconsin-Madison Retirement Association and the Wisconsin Coalition of Annuity. ETF was also invited to lead an educational session on strategies for effective health benefits communications at an out-of-state State and Local Government Benefits Association conference in April.

Media Coverage

The WRS and ETF received national exposure in an article, "[Wisconsin's Pension System Works for Everyone](#)", published by Bloomberg in early May. A recent PEW Charitable Trusts report is referenced that ranks Wisconsin as the best-funded state pension fund, based on 2016 data. The article credits the WRS for its hybrid, shared-risk design that "enables Wisconsin to deliver pretty good pensions at quite low cost."

ETF Website Redesign

At the December board meeting we provided a [memo](#) update on the upcoming ETF website redesign. We are currently negotiating with two vendors for the licensing and hosting of a robust content management system (Drupal) and website design and migration. While the timeline has shifted slightly, we continue to work towards a roll out of the new site in early 2019.

Staff will be at the Board meeting to answer any questions.

Attachment A: Website Usage – Visitors and Pages Viewed

Website Usage Visitors and Pages Viewed

